

# Allocation Inquiry, Maintenance and Reports

## Function 501: Allocation Transfer Maintenance

Step 1: Select function 501 from the SMS main menu

Step 2: Enter desired area/region/division number. This will default to the area/region/division you are located in.

Step 3: Enter item number and press enter

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501 SMS501N1      SALES MATERIALS SYSTEM      02/04/94 11:06
                  ALLOCATION MAINTENANCE        FN: ____
Area/Reg/Div/Terr.: XXXXXX
Item Number.....: _____
* - Allocation records exist below this level:          New
Location          Actual = (Usage + Avail) - Transfer Avail Draw
  
```

If you wish to update any or all of the allocations displayed, use the following steps.

Step 4: Enter the quantity that you wish the individual division to have in the "New Avail" column. \*\* You can update draw capability simply by putting a Y/N in the "Draw" column.

Step 5: Once you have entered all your quantities, press F4 to update. You can use F7 & F8 to scroll backward and forward

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501 SMS501N1      SALES MATERIALS SYSTEM      02/04/94 12:51
                  ALLOCATION MAINTENANCE        FN: ____
Area/Reg/Div/Terr.: 11XXXX      << Found 9 locations >>
Item Number.....: 248360 DORAL NEW PKG SHELF STRIP
* - Allocation records exist below this level:
Location          Actual  Usage  Avail  Transfer  New Avail Draw
11 BOSTON REGION      0       0       0         0         0
1122 PORTLAND ME DIVISION 0      31       0        31         N
1124 NASHUA NH DIVISION 0      34       0        34         N
1126 N. BOSTON DIVISION 0      46       0        46         N
1128 S. BOSTON DIVISION 0      46       0        46         N
1130 NEW BEDFORD MA DIVIS 0      13      11       24        11 N
1134 WORCESTER DIVISION 0       0       0         0         N
1140 BOSTON CHAIN DIVISIO 0       0       0         0         N
1150XX BOSTON MILITARY DI 0       0       0         0         N

Enter-PF1-PF2-PF3-PF4-PF5-PF6-PF7-PF8-PF9-PF10-PF11-PF12-
      Help      Retrn Updt      Bkwrld Frwrld      Main
  
```

51843 3271

Function 502: Allocation Inquiry

Step 1: Select function 502 from the SMS main menu

Step 2: Enter desired area/region/division number. This will default to the area/region/division you are located in.

\*\* You can use wildcards in this function and help is available to demonstrate how to use the wildcards by pressing F1. F7 & F8 are used to scroll forward and backward.

502 SMS502N1		SALES MATERIALS SYSTEM		02/04/94 13:47	
		SMS ALLOCATION INQUIRY		FN: _____	
Area/Reg/Div/Terr*: 1\$\$\$XX (Wildcards Allowed) << Found 49 locations >>					
Item Number.....: 248360 DORAL NEW PKG SHELF STRIP					
Location	Actual	Usage	Available	Transfer	
1 1122 PORTLAND ME DIVISION	0	31	0	31	
2 1124 NASHUA NH DIVISION	0	34	0	34	
3 1126 N. BOSTON DIVISION	0	46	0	46	
4 1128 S. BOSTON DIVISION	0	46	0	46	
5 1130 NEW BEDFORD MA DIVISION	0	13	11	24	
6 1134 WORCESTER DIVISION	0	0	0	0	
7 1140 BOSTON CHAIN DIVISION	0	0	0	0	
8 1150XX BOSTON MILITARY DIVISIO	0	0	0	0	
9 1222 YONKERS DIVISION	0	0	0	0	
10 1226 NORTH JERSEY DIVISION	0	0	0	0	
11 1228 CENTRAL JERSEY DIVISION	0	0	0	0	
12 1230 NEWARK DIVISION	0	0	0	0	
13 1232 SOUTH CENTRAL JERSEY DIVI	0	0	0	0	
14 1240 NEW JERSEY CHAIN DIVISION	0	0	0	0	
15 1242 NORTH JERSEY CHAIN DIVISI	0	0	0	0	
Enter-PF1-PF2-PF3-PF4-PF5-PF6-PF7-PF8-PF9-PF10-PF11-PF12-					
Help	Retrn	Bkwd Frwd		Main	

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Function 504: Allocation Transfer Inquiry

- Step 1: Select function 504 from the SMS main menu
- Step 2: Enter the item for which you wish to display allocation transfers in the "Item Number" field. Press enter if there is no more information to be entered.
- Step 3: (Optional) Enter desired location. This will default to the area/region/division you are located in.
- Step 4: (Optional) Enter a specific start date in the format of YYMMDD for the date on which allocations for the item were transferred. Press enter.

504 SMS504N1	SALES MATERIALS SYSTEM	02/07/94 07:55
ALLOCATION TRANSFER INQUIRY		FN ____
Item Number.....: 382428		
Optional: Location...: _____		
Optional: Start Date: _____ (YYMMDD)		
Amount From To Date _____ User Transferring Information _____		
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---		
Help Retrn Bkwd Frwd Main		

In the example below, 713 allocations were transferred from national on 01/07/94 by John Doe. 500 of the 713 allocations were transferred to 1110XX, and the remaining 213 were transferred to area 2210XX.

504 SMS504N1	SALES MATERIALS SYSTEM	02/07/94 08:10
ALLOCATION TRANSFER INQUIRY		FN ____
Item Number.....: 382428 SVGS.93 MB OCC 400 32133 12/31/94		
Optional: Location...: _____		
Optional: Start Date: _____ (YYMMDD) << Found 3 transfers >>		
Amount From To Date _____ User Transferring Information _____		
713-	XXXXXX	01/07/94 WSSSS XXXXXX John Doe (910) 741-9999
500	XXXXXX	1110XX 01/07/94 WSRRR XXXXXX Jane Doe (910) 741-8888
213	2XXXXX	2210XX 01/07/94 WSSSS XXXXXX John Doe (910) 741-9999
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---		
Help Retrn Bkwd Frwd Main		

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**Function 506: Allocation Transfers (Spreadsheet)**

**Step 1: Select function 506 from the SMS main menu**

**Step 2: Enter the item number for which you wish to transfer material.  
Press enter.**

If the item has been allocated, the following screen will be displayed

506 SMS506N1		SALES MATERIALS SYSTEM		02/07/94 08:53	
ALLOCATION TRANSFERS (SPREADSHEET FORMAT)				FN ____	
Location: XXXXXX NATIONAL					
Item Name: 458221 DOR .25/PK #33772,06/30/94					
SKU: ROLL Pack: 500.000					
Transfer to			Transfer to		
A/R/D/T	Available	Amount	A/R/D/T	Available	Amount
11XXXX	37		1230XX	73	
13XXXX	58		1523XX	65	
1610XX	15		1728XX	91	
1730XX	40		1732XX	28	
1736XX	101		1738XX	39	
2124XX	153		2126XX	271	
2128XX	152		2134XX	131	
2138XX	86		2210XX	393	
2328XX	1		2410XX	748	
2436XX	584		2438XX	616	
2510XX	26		5826XX	98	
5828XX	5		5830XX	105	
Enter-PF1-PF2-PF3-PF4-PF5-PF6-PF7-PF8-PF9-PF10-PF11-PF12-					
Help		Retrn UPD		Main	

**Step 3: In the Transfer to A/R/D/T field, enter the location to which you wish to transfer the item (Area/region/division/territory). Enter the amount you wish to transfer in the corresponding Transfer Amount field.**

**Step 4: When you are finished entering transfers and are ready to save your changes, press F4 (UPD) to update.**

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Function 507: Allocation Inquiry By Location

Step 1: Select function 507 from the SMS main menu

Step 2: Enter desired area/region/division number. This will default to the area/region/division you are located in.

Step 3: (Optional) Put an "X" next to options to choose to view only draw items or no draw items. The option is chosen by placing a "Y" next to your preference, and hit enter.

507 SMS507N1		SALES MATERIALS SYSTEM		02/10/94 07:40	
		ALLOCATIONS BY LOCATION		FN: _____	
Location.....: 1XXXXX					
Other Options: _					
X	Item Desc (1-15 OF 38)	D	Actual	Usage	Available Transfer
-	85431 MFM TRAINING KIT	Y			
-	95653 ELMT-PRINTED MATERIALS	N	4	1	3
-	95681 ELMT-BINDER CONTENTS	N	4	1	3
-	141440 OVERHEAD MODULE ENHANCED D	N	6893	6135	758
-	141451 OVERHEAD MAIN ENHANCED DEC	N	3254	3122	132
-	147787 TRAINING CLASS NAME TENT C	N	5	5	
-	189004 INSIDE CORNER KIT-ENHANCED	N	3	1	2
-	201723 DM DEVELOPMENT PROGRAM BIN	N	2		2
-	275827 VPR LABEL GUN	N	21		21
-	339929 L/P TOP SIGN F/8-SD L/P CE	N	1		1
-	352882 OPM DUST COVER F ENHANCED	N	206	3	203
-	382428 SVGS.93 MB OCC 400 32133	N			500
-	392152 MARSH SUPER STUDY-CIG CATE	N	100		100
-	394044 HALF Y-SIGN MODULE ADD ON	N	143	17	126
-	395221 MARSH SUPER STUDY-WORK SHE	N	6		6
Enter--PF1--PF2--PF3--PF4--PF5--PF6--PF7--PF8--PF9--PF10--PF11--PF12--					
Help		Retm		TOP Bkwd Frwd Main	

Step 4: If you wish to view the drive period information for a particular item, place an "X" next to the item and press enter. This will display the drive period week and quantity.

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Function 508: Allocation Inquiry By Item Number

Step 1: Select function 508 from the SMS main menu

Step 2: Enter desired item number

Step 3: (Optional) Enter desired area/region/division number and press enter.

508 SMS508N1		SALES MATERIALS SYSTEM		02/10/94 07:58	
		ALLOCATION DISPLAY BY ITEM NUMBER		FN: ____	
Item Number: 275827 VPR LABEL GUN					
Optional Starting A/R/D/T: 1XXXXX 1 NORTH ATLANTIC SALES AREA					
Sku: BOX Pack: 1.000					
(1-12 OF 321)					
A/R/D/T	Actual	Usage	Available	Transfers	Draw
1XXXXX	21	21			N
11XXXX	3	3			N
1122XX	20	20			N
1124XX	23	23			N
1126XX	23	23			N
1128XX	26	26			N
1130XX	24	24			N
1134XX	16	12	4		N
1140XX	12	10	2		N
1150XX	7	7			N
12XXXX	6	6			N
1222XX	26	26			N
Enter—PF1—PF2—PF3—PF4—PF5—PF6—PF7—PF8—PF9—PF10—PF11—PF12—					
Help Retm TOP Bkwd Frwd Main					

Function 509: Allocation Transfers

Step 1: Select function 509 from the SMS main menu

Step 2: Enter desired area/region/division number. This will default to the area/region/division you are located in.

Step 3: Enter item number and press enter.

509 SMS509N1		SALES MATERIALS SYSTEM		02/10/94 08:10	
		ALLOCATION TRANSFER		FN: ____	
Location: 11XX Available Amount: 35					
Item: 275827 VPR LABEL GUN					
Stop Date: 12/31/99					
Transfer to Location	Transfer Amount	Transfer to Location	Transfer Amount		
1126__	10__	1128__	15__		
1130__	10__				
_____	_____	_____	_____		
_____	_____	_____	_____		
_____	_____	_____	_____		
_____	_____	_____	_____		
_____	_____	_____	_____		
_____	_____	_____	_____		
_____	_____	_____	_____		
Enter—PF1—PF2—PF3—PF4—PF5—PF6—PF7—PF8—PF9—PF10—PF11—PF12—					
Help Retm UPD Main					

Step 4: Enter the location that you wish to transfer allocations to and then enter the amount you wish to transfer out. Press enter and you will see your allocations decrease. Transfers will not take place until you hit F4 (UPD).

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